Congressional August Recess Guide 2022

This guide provides resources to help you and your members connect with your legislators during the 2022 congressional August recess. If you have any questions or need assistance, please feel free to contact Senior Director of Public Policy, Matthew L. Evans.

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WHY YOU SHOULD ENGAGE

Every August, members of Congress return to their home states for recess. Lawmakers frequently use this time to meet with constituents, host town halls, and attend local gatherings. This presents a great opportunity for advocates—like you—to reach out to elected officials and communicate on issues that are important to your organization and our field. Lawmakers typically have more time to meet with their constituents when they are back home during a recess, giving you the opportunity to share our issues, interests and concerns with them.

For those that attended Foundations on the Hill this year, this is an opportunity to follow up on your conversations and continue to build relationships and understanding of the issues that affect the philanthropic sector. For PSOs or for your foundation members who could not attend FOTH this year, the August Recess provides another great opportunity to connect with your members of Congress.

TIMING OF AUGUST RECESS 2022

Members of the Senate are in recess from August 6 to September 6, 2022.

Members of the House of Representatives are in recess from July 29 to September 13, 2022.

WAYS TO TAKE ADVANTAGE OF AUGUST RECESS

1. Schedule an in-district meeting with your members of Congress.
2. Attend a town hall or other local event hosted by your members of Congress.
3. Invite your members of Congress to attend a tour or site visit to see philanthropy’s work first hand and meet the community members involved in these initiatives.
MEETING TIPS

• **Tell Stories, Not Bill Numbers:** Focus your meetings on illustrating the power of the work you do. Bring your foundation members who can share stories about the impact philanthropy is having on community issues in the elected official’s district/state. Do your research on each member’s policy priorities — such as economic development, rural issues, or healthcare — and share stories and anecdotes that address these concerns. While legislation is crucial in advancing our goals, the specific details of a bill can always be given at the end of the meeting or simply by letting them know that more information is available in the leave-behind packet.

• **Provide Local Data:** Members always want to know how their state or district is fairing on a certain issue and how philanthropy in their state or district compares to the rest of the country. Providing data that drills down to a state or local level will be more compelling than national statistics. Many PSOs compile data on the most active funders in the state, total giving by congressional district, number of foundations by district, and a breakdown of issue areas supported by philanthropy. Always provide any data or statistics you mention in an easy-to-skim leave-behind document and cite your sources. A member’s office might choose to use your information in a press release, speech, or other form of communication.

• **Add a Personal Touch:** Members of Congress meet with dozens of groups each week. To stand out, make the interaction personal by doing research ahead of time about their background. Bring your foundation members or PSO board members who have existing relationships with the members of Congress, live or work in their district, and/or have similar backgrounds. Try to establish a connection and trust before jumping into the issues. Begin the meeting by finding common ground and engaging your representative or senator on a personal level.

• **Make a Clear Ask:** State your request clearly. Ask for specific action from the member of Congress, such as to co-sponsor a bill, reach out to a colleague on an issue, bring up an issue at a hearing, host an event on an issue, or join a caucus. Respectfully seek a firm commitment to whatever action you are seeking.

• **Position Your PSO and the Forum as a Resource.** Legislators and their staffs always appreciate knowing about organizations that can help them with their constituents. Let them know that you can be a resource for questions they get from constituents about philanthropy in their district/state and that you are a member of the Forum, which has offices in Washington, D.C.

• **Do Not Be Partisan.** Please do not make comments that are politically leaning or charged. The Forum works with elected officials in a nonpartisan manner.

• **Assign Roles:** Be clear with your group about which person is playing which role during the meeting. You might consider the following roles:
- **Facilitator**: Starts the meeting, thanks them for their time, introduces the group, explains who you are and what you do.
- **Storyteller**: Shares a story or anecdote about your work, ideally targeted to the priorities of who you are speaking with.
- **Number Cruncher**: Shares data or information relevant to the conversation and provides easy-to-understand handouts with the information.
- **Asker**: Makes the specific ask to the member of Congress about the action you want him or her to take.

**MEETING TIMELINE CHECKLIST**

**When scheduling the meeting:**

- Look up your legislator’s contact information at [www.house.gov](http://www.house.gov) and [www.senate.gov](http://www.senate.gov) or request that Nate Borek ([nate@unitedphilforum.org](mailto:nate@unitedphilforum.org)) provide the member’s scheduler contact information for you.
- Call the district office and let them know you’d like to schedule a meeting during the August recess while your representative/senator is in the district.
  - Here is a sample script: “Hi, my name is (name) and I’m a constituent as well as an advocate for philanthropy with (name of your organization). I’d like to schedule a meeting with (Representative/Senator X) while he/she is home this August to discuss some of our policy issues and concerns. Could someone help me do that?
  - If you are able to schedule a meeting over the phone, that’s great! Sometimes they’ll have someone call you back or ask you to email the office scheduler. If you leave a message or send an email and don’t hear back within a week, call back, let them know who you emailed or called previously, and go over your script again.
- If you are submitting a meeting request in writing via email or via the legislator’s website, you can use this [template letter](#) to write your meeting request to the legislator’s office, following the instructions provided to you over the phone or on the legislator’s website. Then, follow up by phone to make sure your request was received. Provide some information about who you are and what you would like to discuss.
- Reach out to members of your PSO who are located in or fund in a representative’s district and invite them to join the meeting. The best way for you to get a lawmaker’s attention is offer them the opportunity to hear directly from a constituent who is working in or funding in their district.

**A week or two before the meeting:**

- If you plan on attending the meeting with funders in the area, talk together ahead of the meeting to develop your game plan. Determine a group leader and decide who will cover the different topics that need to be discussed. It often is helpful for the regional or national PSO representative to kick-off the meeting with some introductory remarks, and then allow funders in the meeting to share their stories.
- Review suggested talking points for our issues.
- Research your members of Congress.
  - In addition to reading the information on his or her congressional website, ask your friends and neighbors what they know about your representative or senator. Also ask...
your members if they and their leaders, staff or board members have a relationship with the lawmaker.

- Determine what committee(s) the members of Congress sit on and what issue areas they care about. If they are a member of the House Committee on Ways and Means or the Senate Finance Committee, they have direct jurisdiction over many of the issues that affect the philanthropic sector. Review the Members of Congressional Tax Committees spreadsheet to determine if they sit on Senate Finance or House Ways and Means.
  - Find out if they are already co-sponsors of current bills that are of interest to our field, so that you can thank them during your meeting or encourage them to co-sponsor.

A few days before the meeting:

- Email to confirm date, time and location of the meeting and provide a cell phone number for your group should the congressional staff need to contact you.
- Share any leave-behind documents electronically ahead of the meeting.
- Practice how you will share your story.
- Print out any information sheets that you will leave with the office. Useful leave-behinds include a summary of philanthropy in a state or district, information about your PSO, and summaries of key bills. See PSO leave behind examples on the Forum’s site.
- Print out talking points to use as a reference.

During the meeting:

- Arrive 10 minute early.
- Thank the staff member and/or member of Congress for their time.
- Introduce yourself and your colleagues.
- Tell your story.
- Share relevant data.
- Make a clear ask.
- Consider offering the opportunity for the legislator to do a site visit, perhaps to visit a local beneficiary of a local foundation’s support.
- Ask to take a photo with the member of Congress and your group before you leave.

After the meeting:

- Post on social media about your meeting. Thank the member of Congress for their time and for any commitment they made during the meeting. If you took a photo, post that as well. Include the legislator’s Twitter or Facebook handle in your message. Include @unitedphilforum in your post. Use #philanthropyadvocates and other hashtags related to the bill or topic that you are posting about.
- Follow up via email to thank the members of Congress and their staff for their time, briefly recap the main points of the meeting, provide any extra information or data they requested, and restate your ask.
- If you talked about doing a site visit, follow up to confirm the details.
DROP BY A DISTRICT OFFICE

If a meeting time isn’t available with your member of Congress or a staff member, you can stop by their district office during regular business hours to drop off information. Here’s a suggestion on what you could say:

“Hi, my name is ____________ and I live in _______. I am a constituent of ______ and an advocate for philanthropy. I wanted to leave some information here to pass on to the Representative/Senator while she/he is home for the August recess. I have also included information on the impact of philanthropy in our district/state. Could you please pass this on to (Representative/Senator)? Thank you for your time and attention.”

TOWN HALL MEETING TIMELINE CHECKLIST

Many members of Congress hold Town Hall meetings in August as a chance to hear from many of their constituents at one time. To find out if there is a meeting scheduled in your area, call your representative’s or senator’s office and ask if he or she will be hosting any Town Hall meetings.

Before the August Recess:

☐ Find out which members of Congress are hosting town hall meetings.
  - They will often list their town hall meetings on their websites. Visit www.house.gov and www.senate.gov to find your legislators’ websites. Once on their website, you can sign up to be on their mailing list and get information on all upcoming events.

During the town hall meeting:

☐ Depending on the format of the meeting, you can either ask a question during the meeting or speak to your elected official/staff member prior to or at the conclusion of the meeting.
☐ Raise your hand and ask a question! Most town hall meetings allow constituents to raise their hands to ask questions. If it’s very crowded, not everyone will be called on, but it’s worth trying.
☐ If you get called on, start off by thanking the legislator for the chance to speak and sharing your name, your city/town, and your connection to philanthropy.
☐ Remember to be respectful. You want to leave a good impression on the legislator and his/her staff so that future interactions are positive. It’s also a chance to find support from other audience members, so be receptive to others who approach you after the meeting.

After the town hall meeting:

☐ Find a staff person to give your handouts and business card and to get their business card.
  - It is important to build positive relationships with the legislator’s staff members. They will be the ones answering the telephone or responding to your email in the coming months and years, and also have the ear of the legislator when it comes to policy matters. It can also sometimes be easier to develop a strong, long-term relationship with a legislator’s staff who work in their district office(s) rather than with staff who work in the DC office.
- Ask if the staff person if he or she would be the best person on staff for you to follow up with. If not, ask if they can put you in touch with the most appropriate staff member.
- Follow up after a Town Hall meeting with a phone call or email to the legislator’s office, preferably to the staff member you met.
  - This is another chance to share your story and ask for support of the policy issues you are advocating for. It also will help solidify the relationship and allow you to continue the dialogue in the coming months and years.

**Note about Town Hall meetings:** Town Hall meetings have become more popular for constituent groups in recent years, and often can become contentious if the groups do not agree with the legislator. Do not be partisan and do not make comments that are politically leaning or charged. The Forum works with elected officials in a nonpartisan manner.
PUBLIC POLICY PRIORITIES

The Forum has identified Public Policy Principles for the 117th Congress, which help us address racial inequities, advocate on behalf of the sector, identify and identify practical public policy solutions that catalyze a just and equitable society where all can participate and prosper.

Below you will find a list of items and talking points about philanthropy and specific issues that you may want to use during your meeting. At the bottom of this guide, there are issue briefs attached for each of the following policy priorities.

The Value of Philanthropy

Philanthropy is valuable to our country and it is important for legislators to understand the sector’s contribution to their communities. Our country’s tradition of generosity has a vibrant, unique history and is a big part of what distinguishes the United States from the rest of the world. Giving in our country is ever evolving and deeply intertwined in the national story. Individuals and organizations gave $484 billion to charities in 2021 to help their communities.

The charitable sector works alongside, but separate from, the institutions of government and business. This allows individuals to freely choose how to make society a better place through their own initiatives including those that help communities impacted by inequitable public policy.

Philanthropy offers more than just grantmaking. We convene organizations, facilitate collaboration, share knowledge, and pool resources. The charitable sector plays a valuable and important role in collaborating with the public sector to leverage public investments and ensure a healthy democracy.

Legacy IRA

The Legacy IRA Act is an expansion of the IRA Charitable Rollover, which would increase the current maximum annual contribution of $100,000 by indexing the maximum to the annual rate of inflation (the Consumer Price Index or CPI), allowing the cap to increase each year as the CPI increases. It would take effect after 2023. It would expand the IRA charitable distribution provision to allow for a one-time, $50,000 distribution to charities through charitable gift annuities, charitable remainder unitrusts, and charitable remainder annuity trusts, effective immediately.

Expand the Universal Charitable Deduction

To ensure all taxpayers continue to have access to giving incentives, Congress should renew and expand the universal charitable deduction. This will help charitable organizations achieve their missions and support their workforces and communities as our nation recovers from the current and future crises. The Forum supports making the charitable deduction available to all taxpayers to incentivize giving by every American.

Support the Nonprofit Strength and Partnership Act

The nonprofit sector is an economic powerhouse, a trusted community touchstone and service provider, and a critical ally in designing and implementing the work of government. The Nonprofit Sector Strength and Partnership Act creates mechanisms that leverage the mission, knowledge, and impact of nonprofits to help government and the sector work together more effectively in pursuit of
shared goals. It also calls for releasing quarterly economic data on the nonprofit sector in the same way as other industries, reducing paperwork for nonprofits to register and fundraise in multiple states, increasing access to national service, streamlining federal grant processes, and recommending clearer rules on nonprofit civic engagement. Taken together, these policies will make our sector stronger and enable nonprofits to better serve their communities by scaling effective solutions, cutting red tape, and meeting the unique needs of nonprofit workers.

Voting Rights
A strong democracy thrives when all can participate in the sacred act of voting, unencumbered. And while participation in voting has increased, we have also seen systemic inequities in electoral processes and in laws passed making it more difficult for some Americans, specifically voters of color, to vote. While America has made strides in the past to rectify racial discrimination, these intentionally restrictive voting laws represent a shift backward in our quest for equity and justice for all. The Forum issued a sector letter in support of voting rights.

OTHER FORUM RESOURCES
- Members of Congressional Tax Committees (House Ways and Means Committee and Senate Finance Committee)
BACKGROUND
Since 2006, the current IRA charitable rollover allows taxpayers age 70 ½ or older to make charitable gifts up to $100,000 per year directly from their IRAs to eligible charities. The rollovers are excluded from the donor’s ordinary taxable income. Over the last few years, the sector has seen a surge in the number of rollover gifts, and it is expected to continue in importance as the average age of a U.S. donor is 64 and Baby Boomers account for 43 percent of all current charitable donations.

LEGISLATION
On July 24, 2022, the Senate Finance Committee unanimously passed a modification of the Legacy IRA Act as part of a broader bipartisan retirement reform package, known as “SECURE 2.0” (H.R. 2954). This change in law, which has already passed the House by a vote of 414-5, would expand and build on the IRA Charitable Rollover. The modification of the Legacy IRA Act supported by the House and passed by the Senate Committee would expand the IRA Charitable Rollover by incentivizing seniors to make charitable donations with tax-free IRA rollovers through life-income plans such as charitable gift annuity or charitable remainder trust with a one-time limit of $50,000. The rollover cap would also be permanently raised from $100,000 to reflect inflation.

SECURE 2.0 was introduced by House Ways and Means Chairman Neal (D-MA) and Ranking Member Brady (R-TX) and Senate Finance Committee Chairman Wyden (D-OR) and Ranking Member Crapo (R-ID). The original stand-alone Legacy IRA Act (S. 243/H.R. 2909), before it was incorporated into the larger retirement reform package, was championed by Representatives Beyer (D-VA) and Kelly (R-PA) and Senators Stabenow (D-MI) and Cramer (R-ND).

TALKING POINTS
- **Pass SECURE 2.0 with the modified version of the Legacy IRA Act.** The Legacy IRA Act would incentivize more middle-income seniors to make contributions to their preferred and trusted charitable causes.
- With many Americans unable to afford to give away their retirement income during their lifetimes, the Legacy IRA Act would give prospective donors one more critical way to support the philanthropic sector in a way that works for them. After the donor passes away, the remaining amount is used by the charity for their mission.
- **Enhance charitable giving by supporting the Legacy IRA Act.** As a member of United Philanthropy Forum, we support the Legacy IRA Act Coalition, a national coalition of 60 nonprofit
and philanthropic organizations working to pass this legislation to incentive more giving from seniors. [Learn more and access resources on the Legacy IRA Act coalition website, including this recent coalition letter signed by the Forum.]
Support the Universal Charitable Deduction

BACKGROUND
Since 1917, the federal charitable tax deduction has provided a tax deduction for donations made to nonprofit organizations by taxpayers who itemize their tax returns. The 2017 Tax Cuts and Jobs Act made several changes that hurt the effectiveness of the charitable deduction. By increasing the standard deduction, it greatly reduced the number of taxpayers who itemize and therefore have access to the charitable deduction. Under current law, about 88% of taxpayers don’t itemize, meaning only about 12% of taxpayers have a tax incentive to increase their donations to important causes.

LEGISLATION
In March 2020, Congress enacted a $300 charitable deduction for cash gifts from nonitemizers for 2020 and in December 2020 extended its availability through 2021 and increased the cap to $600 for joint filers. Thereafter, the number of small gifts – especially those of $300 and $600 – saw a significant increase. Data from the Fundraising Effectiveness Project (FEP) shows an increase of 7.5 percent in individual gifts of $300 in both 2020 and 2021, compared to 2019. Additionally, gifts of $600 increased 5 percent in 2021, compared to 2019, the exact amount of the universal charitable deduction for joint filers that expired at the end of 2021.

Congress should enact the Universal Giving Pandemic Response and Recovery Act (S. 618, H.R. 1704). To ensure all taxpayers continue to have access to giving incentives, Congress should renew and expand the universal charitable deduction. The legislation is led by a bipartisan, bicameral group of lawmakers, including Sens. James Lankford (R-OK), Chris Coons (D-DE), Mike Lee (R-UT), Jeanne Shaheen (D-NH), Tim Scott (R-SC), Amy Klobuchar (D-MN), Susan Collins (R-ME), Catherine Cortez Masto (D-NV), and Reps. Chris Pappas (D-NH) and Jackie Walorski (R-IN).

TALKING POINTS
- **Charitable giving works and is good tax policy.** Generous Americans gave almost $485 billion to charity in 2021. Charitable dollars are essential to maintaining a healthy civil society, vital to both nonprofit charities and local governments that depend on these resources to achieve their critical missions. The charitable deduction is good tax policy – a simple calculation shows that those in need receive at least $2.50 in benefit for every $1 of tax benefit. This is an impressive return on investment.
- **Small charitable gifts increased after the enactment of the temporary universal charitable deduction.** In March 2020, Congress enacted a $300 charitable deduction for cash gifts from nonitemizers for 2020 and in December 2020 extended its availability through 2021 and increased the cap to $600 for joint filers. Thereafter, the number of small gifts – especially those of $300 and $600 – saw a significant increase. Data from the Fundraising Effectiveness Project (FEP) shows an increase of 7.5 percent in individual gifts of $300 in both 2020 and 2021, compared to 2019. Additionally, gifts of $600 increased 5 percent in 2021, compared to 2019, the exact amount of the universal charitable deduction for joint filers that expired at the end of 2021.
nonitemizers for 2020 and in December 2020 extended its availability through 2021 and increased the cap to $600 for joint filers. Thereafter, the amount of small gifts – especially those of $300 and $600 – saw a significant increase.

- **While gifts of smaller amounts increased in 2020 and 2021, overall giving trends did not keep pace with inflation.** According to the 2022 Giving USA report, total giving reached $484.85 billion in 2021, but when adjusted for inflation, this was a 0.7 percent decrease compared to 2020. Individual giving also remained flat when adjusted for inflation, totaling $326.87 billion.
- **Include personal anecdotes and data from your members:** Collect data and stories from your members about how decrease in donors and in donations have negatively impacted their work and the communities that they serve.
Support the Nonprofit Sector Strength and Partnership Act

BACKGROUND
The nonprofit sector is an economic powerhouse, a trusted community touchstone and service provider, and a critical ally in designing and implementing the work of government. Over the past two years, nonprofits have served on the front lines as America faces generational health, economic, and social crises. Nonprofits have adapted to disrupted operations and lost revenue while facing increased need in the community. While these challenges may be a poignant reminder of our sector’s importance, nonprofits have been delivering concrete outcomes for Americans for centuries.

Whether they offer housing, nutrition, health, education, disaster relief, artistic inspiration, spiritual well-being, conservation or any number of other essential services, nonprofits are woven into and reflect the communities they serve. They work every day to improve lives and build a brighter future. Although they exist to advance a charitable mission, nonprofits have tremendous economic impact as the nation’s third-largest employer and generate nearly 6% of GDP.

The Forum supports the Nonprofit Sector Strength and Partnership Act, which would establish government structures and policies that deepen this relationship and help nonprofits achieve their missions.

LEGISLATION
The Nonprofit Sector Strength and Partnership Act creates mechanisms that leverage the mission, knowledge, and impact of nonprofits to help government and the sector work together more effectively in pursuit of shared goals. The proposed White House Office on Nonprofit Sector Partnership and the Interagency Council will allow policymakers access to data, reporting, and frontline, community-specific expertise from nonprofits so they can better assist constituents. These bodies, along with a federal Advisory Board made up of nonprofit leaders, will also ensure nonprofits nationwide are better equipped to quickly turn ideas into action.

Additionally, we greatly appreciate other key policy changes contained in the legislation: releasing quarterly economic data on the nonprofit sector in the same way as other industries, reducing paperwork for nonprofits to register and fundraise in multiple states, increasing access to national service, streamlining federal grant processes, and recommending clearer rules on nonprofit civic engagement. Taken together, these policies will make our sector stronger and enable nonprofits to
better serve their communities by scaling effective solutions, cutting red tape, and meeting the unique needs of nonprofit workers.

**TALKING POINTS**

- **Support the Nonprofit Sector Strength and Partnership Act of 2022.** This legislation will correct longstanding inequities by establishing structures and policies to leverage the knowledge, trusted status, and reach of nonprofits to craft and implement better solutions for all.

- **This legislation will recover and grow nonprofit jobs.** After losing 1.6 million nonprofit jobs in 2020, policymakers need real-time, accurate information on what is happening in the nonprofit workforce, so they can develop better policies to protect and grow sector jobs. This bill will enable the government to report quarterly jobs and economic data for the sector, just as they do for other industries, allowing policymakers to support the organizations and employees in greatest need.

- **The bill will lower the cost of fundraising across states.** This bill supports an innovation to create a single online portal for nonprofits to register as fundraisers across multiple states, potentially saving individual nonprofits thousands of dollars in administrative costs.

- **Lower the burden of federal regulations.** Government funding is one of the larger sources of revenue for many nonprofits, but it often is accompanied by complex administrative requirements and regulations. This bill calls for a commission on federal grant reform to simplify and streamline formal partnerships with nonprofits and ultimately, enable nonprofits to put more resources toward their mission.
BACKGROUND

The late Congressman John Lewis once stated, “The right to vote is precious, almost sacred. It is the most powerful nonviolent tool or instrument in a democratic society. We must use it.”

In the national, state, and local elections held since Congressman Lewis’ death, millions of citizens from across the country have exercised this precious right, in some cases at historic levels, even in the midst of an ongoing global pandemic. For its part, the charitable sector has played a key role in encouraging and helping communities participate in the voting process, uplifting the importance of active civic engagement.

A strong democracy thrives when all can participate in this sacred act, unencumbered. And while participation in voting has increased, we have also seen systemic inequities in electoral processes and in laws passed making it more difficult for some Americans, specifically voters of color, to vote. While America has made strides in the past to rectify racial discrimination, these intentionally restrictive voting laws represent a shift backward in our quest for equity and justice for all.

LEGISLATION

The Forum issued a sector letter urging congress to come together to address these problems through legislation amending the Voting Rights Act of 1965. All of us working in the charitable sector know that the well-being of all Americans, and all communities, is inextricably linked to their ability to exercise their right to vote. Last year, the House of Representatives passed the John Lewis Voting Rights Advancement Act. This year, we support the ongoing work of the Senate to do the same.

The John Lewis Voting Rights Advancement Act would restore the strength of the 1965 Voting Rights Act by requiring jurisdictions with a history of racial discrimination in voting to receive approval from the Department of Justice before making changes to their voting rules. This provision was eliminated by the 2013 Supreme Court decision in Shelby County v. Holder.

Passage of the John Lewis Voting Rights Advancement Act would also establish a more transparent and accountable system for states to report election law changes, ensuring that voters of color who remain the targets of voter suppression have fair and unrestricted access to the democratic process.

Congressman Lewis dedicated his life to advancing civil and human rights for all Americans, recognizing injustices when he saw them and calling them out. “Since the Shelby decision, voter discrimination is on
the rise," Lewis said in a press release in August 2018. "Thousands of people of color are being systematically denied access to the ballot box, many of whom have voted all their lives."

**TALKING POINTS**

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- A strong democracy thrives when all can participate in this sacred act, unencumbered. And while participation in voting has increased, we have also seen systemic inequities in electoral processes and in laws passed making it more difficult for some Americans, specifically voters of color, to vote. While America has made strides in the past to rectify racial discrimination, these intentionally restrictive voting laws represent a shift backward in our quest for equity and justice for all.